

GATEWAY ANNUAL REPORT USER ACCOUNTS AND RIGHTS

Responsible Official

The official that is responsible for submission of the Annual Report is apparent for most unit types, for example the County Auditor for Counties, the Controller or Clerk-Treasurer for Cities and Towns, and the Township Trustee for Townships. For some units, especially ones that don't submit budgets to DLGF, it may be unclear who the responsible official is. The unit's "fiscal officer" should submit the Annual Report. By fiscal officer we mean the employee that is responsible for the management of the unit's financial affairs and record keeping. Many times formal positions have been defined for this function such as Controller, Comptroller, Treasurer, etc. Sometimes it's unclear who the fiscal officer may be. For example some accounting functions maybe performed by a director, superintendent, bookkeeper, clerk, or even an outside contractor. If this is the case, then the Governing Board should formalize their decision, in a resolution, defining who is the unit's fiscal officer. Please send a copy of the resolution to the Board of Accounts so we know who is responsible for the submission of the Annual Report.

User Rights

User Accounts to access the Gateway Annual Report will be setup with three separate options for user rights as outlined below:

- **Submission Rights:** Users with "Submission" rights will be allowed to enter information and submit the Annual Report. After completion of the Annual Report, only the Responsible Official at each unit will be allowed to execute the submission process.
- **Edit Rights:** Users with "Edit" rights will be allowed to enter information, but will not be able to submit the Annual Report. These User Accounts will be used most often by your deputy, office staff, consultant, or software vendor. They will only be established with the consent of the Responsible Official, see the Limited Delegation of Authority form. At this time, there is no capability to restrict access to specific portions of the Annual Report to specific users. Therefore, all users with Edit rights will be able to add/change/delete ALL Annual Report data. As a result, care must be taken by the Responsible Official in the assignment and management of users with Edit rights.
- **Review Rights:** Users with "Review" rights will be allowed to view the Annual Report, but they will not be able to enter information or submit the Annual Report. Most SBoA staff will have Review rights. Other Review User Accounts may be setup with the consent of the Responsible Official, see the Limited Delegation of Authority form.

You should not share your User Account with others. Each person that needs access to the Gateway should have their own User Account. Each user will be responsible for any actions taken by someone using their User Account. The Responsible Official is responsible for the accuracy and completeness of the submitted Annual Report regardless how the data was entered.

Requesting and Maintaining User Accounts

- If you need to submit Budgets and don't already have a User Account please contact the Department of Local Government Finance (DLGF) at gateway@dlgf.in.gov.
- Users that already have Gateway accounts and new users for Budget submission will initially be given the same rights for the Annual Report. If you want to change a user's rights for the Annual Report to something different than their Budget rights, fill out the State Board of Accounts (SBoA) Limited Delegation of Authority form. Please note that this will not affect their rights to the Budget system.
- If you are a unit that does not submit Budgets to DLGF, please request a User Account by sending your name, title, e-mail address, unit name, and county to annualrpt@sboa.in.gov.

- If you want to add a new user with Edit or Review rights to the Annual Report fill out the SBoA Limited Delegation of Authority form.
- If you want to delete a current user from Annual Report access, fill out the SBoA Limited Delegation of Authority form. Please note that deleting a User Account from the Annual Report will not affect their access to the Budget system. Contact DLGF to delete User Accounts from the Budget system.
- Only the Responsible Official can sign the SBoA Limited Delegation of Authority form.

Please send any questions to annualrpt@sboa.in.gov